C2710 11/22/83

Special Report: What's on the menu in fast-foods - Magazine

Exercise wear takes off - Page 3

Annenberg savors victory over Time - Page M-32

Advertising Age

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$1.25 a copy; $50 a year — The international Newspaper of Marketing • In Two Sections, Section 1. — November 21, 1983

Hearst plans new Hispanic paper

By JENNIFER PENDLETON

Los Angeles—Hearst Corp. is developing a Spanish-language newspaper as a possible solution to its declining fortunes here.

The publisher of the troubled Los Angeles *Herald-Examiner* is calling the new vehicle *El Heraldo*, and is at present talking to major advertisers about the viability of the project.

While a final decision about whether it will start in May, as planned, hasn't been made, sources close to the project say they are optimistic Hearst will give it the go-ahead.

Hearst officials are meeting in Los Angeles today to discuss the issue.

If all goes according to plan, *El Heraldo* will be a broadsheet newspaper distributed free of charge in high-density Hispanic areas in eastern and central Los Angeles.

It will start with twice-a-month frequency, but within six months Hearst hopes to make it a weekly. Eventually, the company hopes to

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Alberto split 30s suit may add ABC, NBC

By CRAIG REISS and NANCY MILLMAN

CBS was the only tv network named in Alberto-Culver Co.'s counter lawsuit last week over the use of split 30-second commercials, but ABC and NBC "technically could be named as defendants" if they don't reach an agreement with Alberto by Nov. 22, a company official said.

CBS and Alberto-Culver sued each other in complaints in which each claimed to be the champion of the "little guy" advertiser.

In a suit filed in federal court in New York on Nov. 15, CBS Inc. alleged that Alberto-Culver has used coercion to force the Big 3 tv networks to accept that company's 30-second commercials containing two nonintegrated product messages.

Also named as defendants in the CBS suit were ABC and NBC, since any judgment in the case would be meaningless unless it were binding on the other two tv networks.

On the following day, Alberto-Culver answered back with a class-action suit of its own against CBS, the National Assn. of Broadcasters (NAB) and 10 tv station groups that have refused to accept the Alberto split 30s.

The station groups involved are: Cox Communications; Hearst Corp.; King Broadcasting Co.; Knight-Ridder Broadcasting; Meredith Corp.; Metromedia Inc.; Post-Newsweek Stations; Scripps-Howard Broadcasting Co.; Storer Communications, and Westinghouse Broadcasting & Cable Co.

Taft Broadcasting and Capital Cities Communications were not cited in the suit since they recently agreed to accept the Alberto split 30s.

The issues in both cases center around the efforts this year by Al-

(Continued on Page 70)

Almaden wine moves $10 million to BBDO

By RUTH STROUD

In a move that appears to have caught the wine industry by surprise, Almaden Vineyards has fired Dancer Fitzgerald Sample, its agency of 12 years, and named BBDO/West, San Francisco, to handle its $10 million-plus account.

The move, effective Jan. 1, came without a formal review, but close on the heels of a top-level shakeup at Almaden and amidst recent declines in shipments and market share at the winery.

In October, John McClelland, president and general manager of Almaden, resigned to join Geyser Peak Wineries, Geyserville, Cal., as chairman. Mr. McClelland, a 25-year veteran of the winery, held the top post for three years and, according to some sources, was pressured into resigning.

He was succeeded as general manager by Ron Siletto, who has been Almaden's vp-marketing since May. At that time he moved from a similar post at National Distillers & Chemical Corp., New York, Almaden's parent company.

In the marketing spot, Mr. Siletto replaced Greg Sivashian, who left to enter the financial-services field.

In his new position, Mr. Siletto recruited Robert Mutschler, former marketing manager on National Distillers' Windsor Canadian, as his new director of marketing. The president title at Almaden will not be filled.

When he arrived in May, Mr. Siletto brought with him from National Distillers a more "firebrand" style of competitive marketing, which he began implementing almost immediately, hoping to halt Almaden's sliding sales.

- Wine shipments had slipped from 30.4 million gals. to 28.8 million gals., or 5.3%, between 1981 and 1982, according to *Impact*, a wine and spirits newsletter. The winery had forfeited its status as the third-largest U.S. winery to Wine Spectrum, which grew 15.3%

(Continued on Page 73)

last minute news

Chrysler may consolidate network tv buying

Detroit—Chrysler Corp. may consolidate network tv media buying with one of its two agencies. Now, Kenyon & Eckhardt buys for Chrysler-Plymouth and corporate, and BBDO, for Dodge. Agency revenues would be unaffected if Chrysler picks a single network agency of record. The idea is to improve Chrysler's influence with bigger buys.

Armour joins rush to low-cal frozen dinners

Phoenix—Armour Food Co. will introduce Classic Lite, a nine-item line of frozen dinners with less than 300 calories, in 12 to 15 selected markets in six to eight weeks, with ad spending at a $10 million rate. Tv and print ads will stress health and fitness, via Bozell & Jacobs, Dallas.

Avco Financial to B&B for $4 million account

Los Angeles—Avco Financial Services named Benton & Bowles to handle its $4 million account, replacing incumbent Cunningham, Root & Craig. Finalists included Eisaman, Johns & Laws and DDB, which withdrew after getting Coast Federal Savings' $4 million account, formerly at Ayer. DDB also withdrew from competing for American Savings' $8 million-to-$10 million account; Eisaman and WRG/West are in the running. WRG is said to be the frontrunner for American, formerly in-house.

(Continued on Page 8)

NEWSPAPER
'C
fo
Page
M
EMJF
DC2001 4CONGLI
AA
CONGRESSIONAL INFO SERVICE
SRI ACQUISITIONS
4520 EAST-WEST HWY #800
WASHINGTON DC 20014

Source: Wide World Photos

Controversy lingers a 'day after'; Falwell vows ad boycott

By DIANE MERMIGAS

A boycott against sponsors of ABC's controversial drama "The Day After" is being planned, said Rev. Jerry Falwell.

Rev. Falwell, head of the Moral Majority, told Advertising Age it is likely his organization this week will launch a consumer boycott against all advertisers who bought time

(Continued on Page 68)

Rev. Jerry Falwell (l.); scene from "The Day After" (above).

Sponsors ask relief on ad time from nets

By GAY JERVEY and CRAIG REISS

NEW YORK—Advertisers over the last month have asked the Big 3 tv networks to take back for resale fourth-quarter commercial time in all dayparts—time worth tens of millions of dollars.

While not all, or even most, of the requests for "relief"—as the practice is called—have been granted by the networks, the large amount of requests for resale are indicative of the abnormal state of the tv advertising marketplace through the rest of the year.

Experts have noted that the attempts by advertisers to pull back on their fourth-quarter tv commitments have less to do with the state of the national economy than with financial adjustments for yearend performance reports and marketing shifts among brands.

Advertisers are prohibited by Federal Trade Commission regulations from reselling commercial tv time. To gain relief, the advertiser must ask the tv network to serve as broker on the resale.

The networks do not have to resell the time, although generally the Big 3 will attempt to accommodate the advertiser if the resale will not adversely affect the tv marketplace.

Gillette Co. frequently has been mentioned as one advertiser that cut back drastically on its fourth-quarter network commitments.

However, Thomas Ryan, vp-advertising services, Gillette North America, said the requests for relief were business as usual for Gillette, that this quarter does not show more juggling activity than usual.

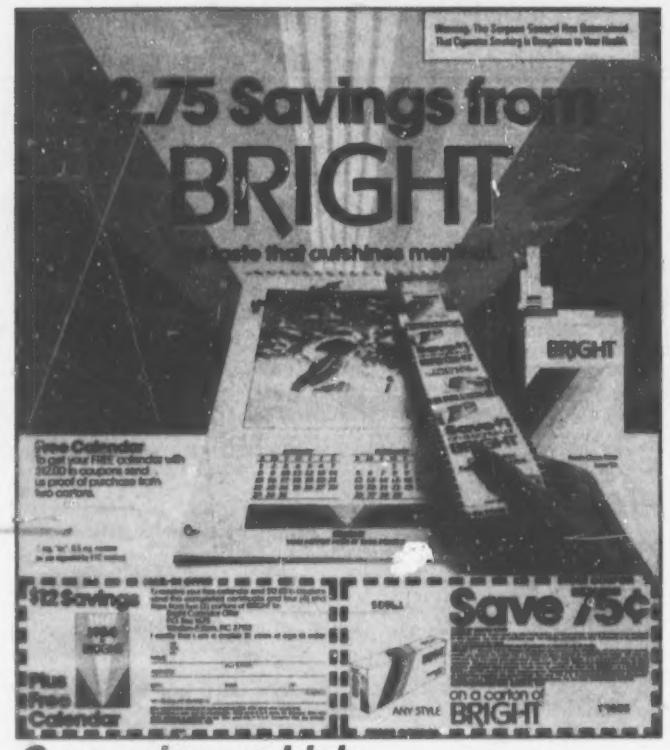
"Yes, we are making some adjustments, but I don't want it to get blown out of proportion," Mr. Ryan said. "All year, there is a constant flow of such adjustments."

He conceded that Gillette is "lightening up a little on sports.

"Everyday we're changing, adding, subtracting," Mr. Ryan said. "The fourth quarter tends to be a time when they have to make adjustments to profit goals."

As the requests build for network relief, the impact is being felt in the scatter and syndication mar-

(Continued on Page 70)



On a scissors kick

R.J. Reynolds is offering buyers of its Bright low-tar cigarets up to $12.75 worth of coupons in a new promotion *(see story on Page 67)*.

Headline News: CNN hikes price

By MAURINE CHRISTOPHER

The cost of headline-style cable news is going up for some operators, now that there is only one product in the market.

The price for Turner Broadcasting System's CNN Headline News, when bought alone, has been raised from a monthly 5¢ to 20¢ per home for new clients as of today.

However, systems that carry all three Turner services, Cable News Network, WTBS and CNN Headline News, as a part of basic cable will continue to get CNN Headline News free as a bonus to CNN.

CNN, Turner's original in-depth news service, continues to be priced at 15¢ in a new card just mailed to multiple systems operators.

WTBS is marketed to cablecasters by a carrier, Satellite Syndicated Systems, for discounted fees ranging up to 10¢ a month per subscriber. TBS is not allowed to share in that revenue since the Federal Communications Commission does not permit an on-air tv station to satellite itself to cable.

Under the revised card, which will go into effect after the usual six-months notice, the maximum cost cap has been removed.

Traditionally, major cable operators pay basic cable program sup-

(Continued on Page 68)

Dr Pepper gets ad muscle

By TOM BAYER

DALLAS—Dr Pepper Co. is expected to pump more of its resources into advertising and promotion when its takeover by Forstmann Little & Co. is completed in several months, just in time to impact what the company believes is a radically different 1984 campaign.

With spending next year already slated at $35 million-plus—up 25%—to go into a three-for-one bottler co-op ad plan (AA, Oct. 10), Dr Pepper will greatly increase its competitive marketing muscle.

Indications are the soft-drink marketer will hold onto but expand use of its charted 1984 course featuring the new ad theme, "Hold out for the out of the ordinary."

The takeover by Forstmann Little & Co. is precisely the arrangement Dr Pepper Co. had sought when it hired Lazard Freres & Co. last July. Termed a "friendly takeover," the arrangement calls for Forstmann Little & Co. to relieve Dr Pepper Co. of its debt—about $110 million—and to leave the company's management intact.

Altogether, the acquisition totals about $627 million, including $512.5 million for 23.5 million shares of Dr Pepper Co. stock at $22 a share, plus the debt refinancing.

Funds for the leveraged buyout will come from Forstmann Little's own pooled funds and from bank loans. According to *Pension & Investment Age*, Forst-

(Continued on Page 73)

highlights

Monday, November 21, 1983

National advertiser and media groups fear that Supreme Court support for Oklahoma's ban on alcohol ads would endanger First Amendment protections. *See Page 6.*

Hunt-Wesson Foods, battling Procter & Gamble in the cooking and salad oil market, has started comparative ads for Wesson oil. *See Page 6.*

Victor Bloede is stepping down as chairman of Benton & Bowles. *See Page 10.*

Colgate-Palmolive is suing German competitor Henkel, charging violation of the German Law of Unfair Competition in sending out an "excessive" number of free product samples. *See Page 10.*

Waring & LaRosa agreed to become part of BBDO last week. *See Page 12.*

Audi is planning an early December advertising break for its 4000S Quattro, a sports sedan with fulltime four-wheel-drive. *See Page 12.*

The Senate has approved Vanderbilt University law professor Terry Calvani as President Reagan's third appointment to the Federal Trade Commission. *See Page 14.*

Mars Inc. found itself under fire from the National Advertising Division last month for claims made in a tv spot introduced in 1980. *See Page 18.*

Two leading marketers of appetite suppressants are removing caffeine from their brands. *See Page 24.*

A Doyle Dane Bernbach/-West study concludes that computer purchasers will be dominated by two types of consumers --"fast trackers" and "impulse" buyers. *See Page 24.*

The National Geographic Society's new travel quarterly clearly will be an upscale publication, aimed at category leader *Travel & Leisure*. *See Page 26.*

Magazines are expecting a happy new year in 1984 as ad pages and revenues increase during the fourth quarter. *See Page 37.*

CORPORATE CLOSEUP

Bacardi Imports, following two years of slowed growth, is reorganizing its marketing department and emphasizing new-product growth. *See Page 4.*

INTERNATIONAL

Southland Corp., Dallas, is in the midst of the most aggressive international expansion of its 7-Eleven stores in the company's history. *See Page 42.*

Eastman Kodak Co.'s launch last month in Thailand of its low-cost 35mm Signet model has some observers of the camera market wondering if Kodak will bring that product to the U.S. *See Page 45.*

VIDEOTECH

Despite loud denials, there is growing fear among Hollywood creatives that the tv networks are returning to the hectic days of quick cancelations of new shows. *See Page 48.*

"Thicke of the Night's" backers have reiterated their commitment to the series, declaring it is on the right track creatively and no longer running over budget. *See Page 50.*

MAGAZINE

The latest in the "Benevolent Dictators" interviews with leading advertising executives features a conversation with the late Paul Foley, former chairman of the Interpublic Group of Cos., who died in October. *See Page M-4.*

Fast-Food Marketing: Once populated only by the Golden Arches, the industry has remarkably many more players locked in an intense battle for market share. *See Page M-9.*

A selection from Fred C. Poppe's picks of successful business-to-business advertising features 10 of the greatest. *See Page M-26.*

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Sweeps: CBS wins on 'Chiefs'

By JAMES P. FORKAN

NEW YORK—Although ABC led for the first eight days of the November sweeps, CBS pulled ahead in both the 15-day Arbitron Ratings Co. and 14-day A.C. Nielsen Co. sweeps race, thanks to "Chiefs" and its regular hits.

In the Arbitron sweeps period (Nov. 2 to 16), CBS' 19.0 led ABC's 17.4 and NBC's 15.2. The Nielsen span (Nov. 3 to 16) showed CBS even further ahead, 19.5 to ABC's 17.2 and NBC's 15.1.

Besides the three-part "Chiefs," whose major sponsors included Volkswagen and Miller Brewing's Meister Brau, "60 Minutes" (with a season high 27.8 rating/41 share), "Dallas," "Simon & Simon," "Magnum, P.I." and newcomer "After-MASH" contributed to CBS' fifth weekly victory.

In addition, "Knots Landing," which has nudged past NBC's "Hill Street Blues" to become the Thursday 10 p.m. (ET) leader this fall, contributed to the 19.6 rating average for the week ended Nov. 13, a victory that CBS executives dubbed "overwhelming" since the margin (3.3 points) was the widest thus far this fall.

NBC-TV, still the also-ran in the

(Continued on Page 73)

BUTTONS BADGES EMBLEMS
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Public shops hold their own in quarter

By CHRISTY MARSHALL

NEW YORK—The third quarter for publicly held advertising agencies was "pretty decent, with a few blips here and there," according to Fred Anschel, analyst with Dean Witter Reynolds. Looking ahead, he sees a good fourth as well.

Alan Gottesman, analyst with L.F. Rothschild Unterberg Towbin, agreed, adding, "On balance, the industry seems to be doing alright."

At the same time, BBDO announced it had filed with the Securities & Exchange Commission for a public offering of 650,000 shares of common stock—a little more than ten years after BBDO made its first public offering in October, 1973. Then the price was $9 a share; today, BBDO sells near $40.

The company predicts those newly issued shares will be available during the week of Nov. 21. The underwriter, Dean Witter Reynolds, has been granted a 97,500 share overallotment option. The proposed maximum aggregate offering price is $31.8 million. The money made from the offering is earmarked for possible acquisitions. According to the prospectus, "the company is in an advanced stage of negotiations with regard to the acquisition of one advertising agency and is holding discussions regarding the possible acquisition in 1984 of an advertising-related firm."

Agency financial results

Agency	Income ($000) 1982	1983	(%)	Revenues ($000) 1982	1983	(%)
Third quarter						
BBDO	2,505	2,965	+18	50,544	63,128	+25
DDB	(1.299)	(1.075)	—	37,599	41,962	+12
FCB	1,915	3,650	+90	42,303	53,867	+17
Grey	1,326	1,585	+19	33,144	40,970	+24
Interpublic	2,057	2,514	+22	135,080	136,959	+ 1
Mickelberry	458	468	+ 2	19,545	21,667	+11
O&M	2,398	2,814	+17	75,422	80,996	+ 7
JWT Group	2,979	3,932	+32	95,558	106,139	+13
Nine months						
BBDO	9,432	11,183	+19	150,780	185,438	+23
DDB	4,176	3,754	−10	129,456	137,764	+ 6
FCB	6,755	8,639	+28	131,335	148,983	+13
Grey	4,467	5,373	+20	101,863	114,332	+12
Interpublic	14,078	15,701	+11	395,179	424,883	+ 7
Mickelberry	1,171	1,374	+17	49,540	64,344	+30
O&M	8,849	8,806	− 0.5	231,548	249,455	+ 7
JWT Group	816	11,035	+125	300,392	328,645	+ 9

Source: Advertising Age

The agency in question turned out to be Waring & LaRosa.

In the third quarter, all publicly held agencies did fairly well in terms of net income. Foote, Cone & Belding led the way with net income soaring 90% to $3.65 million. The past three months have been extremely active for FCB. The agency acquired both NCK Organization and then North Castle Partners, mergers orchestrated around FCB's new client Colgate-Palmolive. Those mergers were not reflected in the third-quarter statement.

JWT Group was the second-greatest gainer in the quarter, with net income up 32% to $3.9 million. According to JWT chairman Don Johnston, the strong showing is attributable to three of the company's subsidiaries—J. Walter Thompson USA, Hill & Knowlton and Lord, Geller, Federico, Einstein—that "achieved record profits, while the financial position of the company over-all improved in a dramatic fashion."

Interpublic Group of Cos. came in third with a net income of $2.5 million, 22% more than in the same quarter of 1982. Also, in the third quarter, Interpublic completed the purchase of Dailey International, based in Los Angeles, whose figures were included in the third quarter. Interpublic's figures included the sale of Talent Center Payment Operation, a small U.S. subsidiary.

Grey Advertising's net was up 19%, to $1.6 million; BBDO was up 18% to $3 million, and Ogilvy & Mather's net increased 17.3%, to $2.8 million. Doyle Dane Bernbach, in its traditionally weakest quarter, watched its net loss narrow; "We narrowed the downness, so to speak," said Robert Pfundstein, DDB's chief financial officer.

Mickelberry, an advertising agency holding company and parent of Cunningham & Walsh, Nadler & Larimer and Laurence, Charles & Free, posted a gain of 2%, with net income rising to $468,000.

BBDO enjoyed the strongest showing in terms of revenue gains in the third quarter of '83, with an increase of 25%, to $63.1 million. Grey was close behind with its revenues climbing 24%, to $40.9 million. Interpublic came in with the slightest revenue gain at 1.4%, to $136.9 million.

For the year to date, JWT Group was the biggest winner in net income and Doyle Dane Bernbach the clearest loser. After a tumultuous 1982, JWT has had a strong recovery in 1983, with its net income up 125% to $11 million.

Those earnings include "pretax provisions of $12.1 million as a result of the now-defunct tv program

(Continued on Page 32)

Clyde's Food Stores, Maysville, Kentucky:
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CLYDE T. BARBOUR, President, Clyde's Food Stores

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Western Union Mailgram

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JIM COLLINS
PUBLISHING DIRECTOR

Ramada to sell small units

PHOENIX—Ramada Inns announced plans to sell at least 30 smaller hotel properties over the next three years and use the proceeds to acquire larger existing hotels in major markets.

Ramada currently owns 70 hotels; an additional 524 are franchised.

Bank group passes out print ad awards

CHICAGO—The Bank Marketing Assn. recently recognized 39 ads as the "Best of Print" in its annual competition for financial advertising.

The winners, by media category, were:

- Newspaper (less than full page, b&w): First National Bank of Chicago; Dauphin Deposit Bank & Trust, Harrisburg, Pa.; Central Bank of the South, Birmingham, Ala.; Shawmut Bank, Boston; Seattle First National Bank; Maine Savings Bank, Portland, Me.; Empire of America, Buffalo, N.Y.
- Newspaper (less than full page, color): Central Bank of the South; Springfield Marine Bank, Springfield, Ill.
- Newspaper (full page, b&w): First National Bank of Chicago; Rainier National Bank, Seattle; Manufacturers Hanover Trust Co., New York; Mount Greenwood Bank, Mount Greenwood, Ill.
- Newspaper (full page, color): Marine Corp., Milwaukee; First National Bank, Stuart, Fla.
- Newspaper campaign (b&w): Bank of Delaware, Wilmington, Del.; First Interstate Bank, Reno; First Bank System, Minneapolis; Old National Bank, Seattle; Bank of New York; Empire of America; Mid-State Bank, Altoona, Pa.
- Newspaper campaign (color): First American Bank Corp., Kalamazoo, Mich.; First National Bank of Chicago.
- Consumer magazine (less than full page, b&w): Liberty State Bank, Troy, Mich.
- Consumer magazine (full page, b&w): Bank of Boston; First Security National Bank, Lexington, Ky.
- Consumer magazine (full page, color): First of America Bank Corp., Kalamazoo, Mich.; Crocker Bank, San Francisco.
- Consumer magazine (campaign, b&w): Old Kent Bank & Trust Co., Grand Rapids, Mich.; Harris Trust & Savings Bank, Chicago.
- Consumer magazine (campaign, color): MasterCard International, New York; Bank of America, San Francisco.
- Business or trade publication (less than full page, b&w): Equibank, Pittsburgh.
- Business or trade publication (full page, b&w): Chemical Bank, New York.
- Business or trade publication (full page, color): New Jersey Bank, West Patterson, N.J.
- Business or trade publication (campaign, b&w): First Interstate Bank, Los Angeles.
- Business or trade publication (campaign, color): Bank of America; Sun Banks Inc., Orlando.
- Direct mail (order solicitation, single mailing): Lincoln First Bank, Rochester, N.Y.
- Direct mail (order solicitation, campaign): Fidelity Bank, Cherry Hill, N.J.
- Direct mail (lead inquiry, campaign): First Bank System, Minneapolis.
- Direct mail (traffic building): Colonial Bank, Montgomery, Ala.
- Transit (campaign): Pacific Western Bank, Milwaukie, Ore.
- Outdoor advertising (painted board): Omaha National Bank.
- Outdoor advertising (campaign): Bank of America, Champaign National Bank, Champaign, Ill.
- Printed material (single brochure): State Street Bank & Trust Co., Boston; Barnett Bank, Jacksonville, Fla.; Rainier National Bank.
- Printed material (campaign): South Carolina National Bank, Columbia, S.C.; Western Bank, Houston; Alaska National Bank of the North, Anchorage.
- Specialty advertising (less than $2.50): Bank of Lexington, Lexington, Ky.
- Specialty advertising ($2.50 to $10): Bank of A. Levy, Ventura, Cal.
- Specialty advertising (more than $10): Western Bank, Houston.
- Sales promotion (point of purchase): Lincoln First Bank.
- Sales promotion (internal): Liberty State Bank.#

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Bay City Times • Muskegon Chronicle • Grand Rapids Press • Kalamazoo Gazette

Eyes have it

Custom Tint Laboratories, Raleigh, N.C., has received Food & Drug Administration approval to manufacture and market Custom Eyes polymacon soft contact lenses tinted in cosmetic colors. Shaller, Rubin & Winer, New York, is handling the advertising, which includes trade and consumer ads that ask, "What color eyes do you want?" Concept is that consumers can change eye color as easily as eye shadow. Meanwhile, Bausch & Lomb has begun marketing tinted lenses regionally through a manufacturing agreement with CTL.

Shop results

(Continued from Page 30)

syndication operation as well as losses in foreign exchange translation and recruitment activities," according to the company. While JWT suffered losses of $3.6 million from currency exchanges, it has gained $1.6 million in foreign exchange gains this year.

"Mr. Johnston noted that interest expense has declined substantially as the company reduced its borrowings in the quarter by $17 million, which included $5 million of long-term debt," stockholders were told.

DDB's net has dropped in the three quarters of 1983, to $3.7 million from $4.2 million in 1982. Mr. Pfundstein attributed that downturn to three factors: A shift of client spending to the fourth quarter; startup costs with its new office in Detroit, and international losses as a result of the strong dollar. However, for the year, Mr. Pfundstein expects the agency to be up.

In terms of revenues for the nine months, all of the publicly held shops posted gains with the greatest increase marked by Mickelberry, up 30% to $64.3 million. BBDO came in second with a 23% gain to $185.4 million.#

and seafood.

Following closely on the heels of doubling beef prices in 1979 is the drought of 1983, which almost certainly will translate into higher beef prices next year. This is bad news indeed for the beefeaters and especially for the beef sellers. Collins Foods' Sizzler Family steakhouses has added crab to its menu, and by doing so upgraded its prices and service from the budget floor to more of a family restaurant. The appearance of the appetizing crustacean generated favorable sales volume. Budget steakhouses like Sizzler—till now the domain of the hard-working, steak-eating, but recession-vulnerable blue collar audience—had to extend their base to attract a slightly more affluent clientele.

Strangely enough, the rise in beef prices adversely affected the higher-price steakhouses. According to Mr. Culp, the consumer draws a line on what he's willing to shell out for steak in a chain restaurant. The buck seems to psychologically stop at $8, while upper-end chain steakhouses were forced to enter the $10 plus range in order to stay in business.

There are, however, always exceptions. In this category it's Chart House, whose upper end steakhouses, all of which are architecturally and geographically unique, are said to be doing a nice bit of business, thank you.

The logical alternatives to beef are chicken and seafood. Both those segments posted gains this year, especially chicken. But here again, chains have had to adjust to consumer preference. Chicken not only continues to be offered by the likes of Kentucky Fried Chicken, Church's and Popeyes (*see story on Page M-23*), but it also crops up on the menus of hamburger chains and steakhouses as a nutritious alternative.

The major activity on the chicken scene has been in the moderately upscale arena. Wendy's Sisters Chicken & Biscuits is one of the recent contenders, while Mrs. Winner's Chicken & Biscuits is already a strong presence in the category with its Southeast-based operation.

These upscale chicken places offer a cozier, pleasant setting in which to consume one's slightly higher-price chicken. Menus are broader, and a down-home-on-the-farm fresh chicken image exudes. Some of the more moderately priced chains like Church's are said to be experiencing some difficulty only because they are located in inner city areas of high unemployment. In response, Church's reportedly increased its advertising budget and recently purchased another chicken chain, Ron's Krispy.

The seafood segment continues to fare well, but for the price-sensitive budget portion, it's been an upstream battle. Budget seafood places, whose mainstay has been deep batter-fried fish, now face a disapproving public concerned with its cholesterol count. The move toward baking and broiling, the

(Continued on Page M-14)

Where Americans run to eat

By John C. Maxwell Jr.

More and more Americans are joining those on the fast track, with many juggling school, careers and family (or various combinations). Consequently, quick, easy, convenient and nutritious meals are essential to their schedules. This trend, in conjunction with a growing number of women in the work force and a higher level of disposable income, should benefit the purchase meal industry considerably over the next several years.

A recent Gallup Poll indicates a significant rise in the number of meals eaten out during the first half of 1983; April set an alltime high with 42% of all meals eaten away from home during that month. Those families most likely to eat in fast-food restaurants are those with children (no matter the age of the children).

Industry sales of $33.6 billion in 1982, an 11.8% gain over 1981, exceeded our expectations. Much of the gain can be attributed to the turnaround of the economy, with volume making a better showing for the second half of 1982. This improvement has continued through the first half of 1983.

Families with nonworking mothers tend to eat at fast-food restaurants less frequently than families with working mothers—89% vs. 96%. With the exception of last year (a recessionary period), the percentage of the population eating away from home has risen year to year, as has the percentage of women in the labor force. Unit gain is now the key to revenue growth.

Heretofore, it was easy for companies to increase prices 10% to 12%, thereby keeping sales artifically high in some instances. Now that we have entered a period of disinflation, the key companies to keep an eye on are those that aim for unit growth while increasing or maintaining their customers.

The top 10 fast-food companies remained unchanged in rank in 1982 *vis-a-vis* 1981. Altogether, the 10 accounted for $17.5 billion in 1982, the equivalent of 52.2% of total industry sales of $33.6 billion. McDonald's, Burger King and Kentucky Fried Chicken each lost minor market share, while Wendy's recorded a slight gain. However, McDonald's remains No. 1, with almost a 19% industry share.

With 47.6% of total sales in 1982, the hamburger-oriented restaurant category of the fast-food industry continued as the No. 1 segment; steak and full-menu restaurants took second place with 21% of total industry sales; pizza and chicken-style restaurants commanded third and fourth places, respectively, with 10.7% and 9.8% of total industry sales. The Mexican food restaurant group registered the largest year-to-year percentage gain in terms of sales—up 22%, a growth trend we believe is continuing in 1983.

Advertising for the fast-food industry in 1982 increased 17.4% to $578.1 million, up from 1981's revised $492.3 million. McDonald's, the leading industry advertiser in 1982, spent $161.1 million, an 18% increase over 1981 expenditures. Burger King and Kentucky Fried Chicken's outlays for advertising totaled $65.1 and $42.6 million, respectively, and represented increases of 39.4% and 17.7%.

Menu expansion, a major characteristic of the industry in 1982, tended to run the gamut, ranging from the inclusion of breakfast items to the addition of salad bars in many major restaurants. Mexican food, always popular in the West and Southwest, continues to gain in popularity in other regions, especially in the Northeast. Several restaurants that previously specialized in other foods have added Mexican fare (such as tacos and enchiladas) to their menus, providing further evidence of an increased acceptance of Mexican food. This trend should persist for the near future.

As a whole, the purchase meal industry looks bright. Commodity prices in 1983 should remain stable. Coupled with a slower rate of inflation, this should enable fast-food industry sales to advance and simultaneously keep menu price increases to about 5% rather than an estimated 6% rise as forecast in December, 1982.

Many more consumers are realizing an increase in disposable personal income, and thus a more flexible life style, which we expect would benefit the full-menu restaurants particularly.

Down the road, fast-food sales are expected to increase 14.3% year to year in 1983. Some of this gain may be attributed to consumers returning to the fast-food market after having defected from it during the recession.

John C. Maxwell Jr. is senior vp at Lehman Bros. Kuhn Loeb Research in New York.

What's for dinner?
Top 10 fast-food companies annual sales ($ million) and market share

	1980		1981		1982	
	Domestic sales	Per cent of U.S.	Domestic sales	Per cent of U.S.	Domestic sales	Per cent of U.S.
McDonald's	$ 5,049.0	18.1%	$ 5,770.0	19.2%	$ 6,362.0	18.9%
Burger King	1,755.4	6.3	1,992.6	6.6	2,191.4	6.5
Kentucky Fried Chicken	1,440.0	5.2	1,600.0	5.3	1,700.0	5.1
Wendy's International	1,209.0	4.3	1,424.0	4.7	1,632.0	4.9
Pizza Hut	945.0	3.4	1,126.0	3.8	1,329.0	3.9
American Dairy Queen	904.0	3.2	1,022.0	3.4	1,200.2	3.6
Hardee's	751.5	2.7	976.9	3.3	1,167.0	3.5
Denny's	541.0	1.9	661.0	2.2	740.0	2.2
Red Lobster	400.0	1.4	553.0	1.8	625.0	1.9
Arby's	478.0	1.7	527.0	1.8	575.0	1.7
Total top 10	13,472.9	48.2	15,652.5	52.1	17,521.6	52.2
Total Industry*	$27,867.0	100.0%	$30,042.3	100.0%	$33,592.0	100.0%

Source: Lehman Bros. Kuhn Loeb Research.
*Based on Commerce Dept. data.

The main course
U.S. fast-food by product group

	No. of companies	1981	Per cent of market	1982	Per cent of market	1983E	Per cent of market	1983/82 Percent change
Hamburgers, franks, roast beef, etc.	107	$14,327,705	47.7%	$15,990,765	47.6%	$18,100,598	47.2%	13.2%
Steak, full menu	109	6,566,702	21.9	7,043,017	21.0	7,849,159	20.5	11.4
Pizza	94	3,169,601	10.6	3,605,807	10.7	4,159,594	10.8	15.4
Chicken	30	2,833,007	9.4	3,308,001	9.8	3,958,399	10.3	19.7
Mexican (tacos, etc.)	33	1,069,712	3.6	1,305,277	3.9	1,576,110	4.1	20.7
Seafood	13	888,491	2.9	1,027,226	3.1	1,211,391	3.2	17.9
Pancakes, waffles	15	847,650	2.8	913,320	2.7	1,009,825	2.6	10.6
Sandwich and other	39	339,480	1.1	398,608	1.2	518,100	1.3	30.0
Total	440	$30,042,348	100.0%	$33,592,021	100.0%	$38,383,176	100.0%	14.3%

Sources: Commerce Department; Lehman Bros. Kuhn Loeb Research.

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Advertising pages for U.S., Canadian, and foreign consumer publications—*November*

	Current month 1983	Current month 1982	Year-to-date 1983	Year-to-date 1982
— Art & antiques —				
American Artist	91.0	61.7	726.1	612.4
Antiques	159.7	163.4	1,445.6	1,607.9
Art in America (11X)	178.0	97.5	1,189.3	1,062.5
Portfolio (6X) D	—	—	274.3	297.5
Southwest Art	105.8	96.0	1,024.9	1,205.7
Total Group	**534.5**	**418.6**	**4,660.2**	**4,786.0**
% change	+27.6%		-2.6%	
— Auto/cycle/rec. vehicles —				
AutoWeek	122.4	161.8	1,369.5	1,481.8
Car & Driver	96.3	101.2	998.6	907.3
Car Collector & Car Classics	21.3	24.9	236.9	248.5
Car Craft	58.5	63.2	791.6	817.8
Cycle	29.2	48.1	647.3	804.5
Cycle Guide	19.8	24.7	460.2	549.0
Cycle World	31.7	27.9	556.2	628.3
Dune Buggies & Hot VWs	87.1	58.5	791.1	611.5
Family Motor Coaching	128.1	102.6	1,278.5	1,060.2
4 Wheel & Offroad	60.6	50.1	742.3	551.0
Four Wheeler	55.4	28.8	478.4	299.9
Hot Rod	42.7	48.7	622.5	626.9
Motorcyclist	22.3	17.8	400.6	534.8
Motor Trend	71.5	85.9	707.4	638.4
Motorhome	69.7	81.2	802.6	648.9
Pickup, Van & 4 WD	26.1	26.3	370.3	297.1
Road & Track	118.1	110.9	1,115.7	1,026.7
3 Wheeling	32.8	24.8	307.0	247.2
Trailer Life	106.0	101.0	1,180.7	1,154.6
Total Group	**1,199.9**	**1,188.4**	**13,857.4**	**13,134.4**
% change	+0.9%		+5.5%	
— Boating & yachting —				
Boating	106.1	93.3	1,252.7	1,186.6
Chesapeake Bay	20.5	23.6	306.1	297.8
Cruising World	112.0	99.5	1,621.4	1,460.5
Lakeland Boating	30.0	28.5	466.0	460.5
Motor Boating & Sailing	104.0	83.7	1,498.5	1,347.5
Sail	101.5	86.0	1,332.1	1,486.9
Sea & Pacific Skipper	46.4	59.6	721.5	794.5
Small Boat Journal (6X)	—	—	195.2	172.6
Trailer Boats	18.0	18.0	248.3	249.4
Western Boatman (6X)	19.5	—	114.3	—
Yachting	138.7	121.6	1,674.2	1,796.3
Total Group	**596.7**	**513.8**	**9,430.3**	**9,252.8**
% change	+13.5%		+1.9%	
— Canadian —				
L'Actualite	99.4	82.3	608.4	600.7
Chatelaine				
English Edition A.	153.7	155.7	1,085.1	1,066.3
French Edition	150.4	129.0	965.2	858.0
City Woman (5X)	—	—	143.9	101.9
Equinox	48.0	43.0	243.5	163.4
Financial Post Magazine A.	44.4	46.7	365.1	436.9
Flare A.	65.5	69.1	565.9	534.2
Homemaker's Magazine	117.0	128.0	841.2	814.9
Madam Au Foyer	86.0	100.5	660.6	612.0
Macleans (52X) A.	176.5	195.5	1,121.1	1,213.4
Quest Magazine (8X) A.	56.5	75.1	355.0	398.7
Reader's Digest:				
Canadian-English A.	119.1	120.9	792.7	807.7
Canadian-French A.	119.9	108.0	725.2	770.6
Toronto Life	146.6	122.5	991.0	1,058.1
Vancouver	100.1	103.3	887.6	912.3
Total Group	**1,485.1**	**1,459.6**	**10,351.3**	**10,349.1**
% change	+1.7%		+0.1%	
— Civic/fraternal —				
American Legion	28.8	36.9	305.2	338.7
Elks Magazine (10X)	27.0	31.0	251.7	242.2
Kiwanis Magazine	15.4	13.9	150.3	135.1
Lion (10X)	14.3	9.5	67.0	73.3
Moose Magazine	27.0	21.0	1,957.0	2,110.0
Rotarian	19.7	19.7	151.7	155.6
V.F.W. (10X)	28.7	32.2	312.0	279.5
Total Group	**160.9**	**164.2**	**3,194.9**	**3,334.4**
% change	-2.0%		-4.1%	
— Comics —				
Archie Comic Group (6X)	—	—	50.0	50.0
DC Comics	8.0	8.0	87.0	80.0
Marvel Comics Group	10.0	10.0	108.0	109.5
Total Group	**18.0**	**18.0**	**245.0**	**239.5**
% change	+0.0%		+2.2%	
— General —				
American Forests	9.8	12.0	108.1	121.0
American West (6X)	23.5	36.2	150.7	174.5
The Atlantic A.	70.5	63.5	476.9	339.1
Audubon Magazine (6X)	34.6	32.9	217.7	190.0
Bon Appetit A.	145.4	134.9	870.5	923.4
Changing Times	62.5	45.2	463.1	407.2
Cuisine Magazine	74.2	58.2	456.3	408.8
Ebony	93.3	101.6	963.1	897.6
Fifty Plus	36.7	35.5	292.0	310.1
Food & Wine	69.1	52.6	420.9	346.8
Games	27.0	39.7	300.9	205.5
Geo	45.1	26.8	299.1	190.4
Gourmet	128.2	114.3	813.0	742.6
Home Entertainment (6X)	39.6	—	221.4	—
Harper's Magazine A.	25.4	17.8	193.9	195.4
Let's Live	—	—	—	—
Life	89.7	75.3	647.2	538.4
Modern Maturity (6X)	—	—	210.3	162.6
Money	180.1	156.8	1,278.1	1,209.1
Moneysworth (4X)	—	—	72.1	132.1
Mother Earth News (6X)	40.3	44.1	307.8	301.9
Mother Jones	17.0	16.7	142.9	124.0
Museum (6X)	—	—	—	—
National Geographic	35.3	29.3	256.4	236.9
Natural History	60.0	45.5	428.5	311.6
Prevention	77.7	82.6	851.0	779.0
Psychology Today	30.5	39.0	286.4	367.0
Reader's Digest A.	133.2	155.7	924.0	997.4
Saturday Evening Post (9X)	42.4	39.2	329.4	332.6
Signature	74.6	66.6	619.2	575.5
Smithsonian	133.1	113.7	853.2	858.9
Success	40.6	30.8	378.9	321.7
Town & Country	244.2	221.5	1,602.3	1,528.4
Travel/Holiday	40.2	46.2	448.2	497.7
Travel & Leisure	126.7	126.4	990.5	1,013.8
Vanity Fair	50.4	—	475.9	—
Video	71.0	69.3	685.4	629.8
Video Review	72.0	64.5	700.9	664.9
Writers Digest	24.6	21.8	312.3	265.6
Yankee	139.1	140.6	963.1	950.6
Total Group	**2,607.6**	**2,356.8**	**20,011.6**	**19,251.9**
% change	+10.6%		+3.9%	
— Home —				
Americana (6X)	37.0	34.8	212.5	201.1
Architectural Digest A.	194.4	171.0	1,421.7	1,454.8
Better Homes and Gardens	156.3	137.2	1,221.3	1,239.5
Colonial Homes (6X)	77.8	80.1	384.7	401.9
Country Journal	50.8	58.3	494.4	509.7
Country Living	75.5	54.0	584.6	391.7
Dallas/Ft. Worth Home & Garden	72.3	69.4	760.4	619.9
Early American Life (6X)	30.5	26.4	167.1	178.7
Family Food Garden (6X)	42.8	37.0	319.9	254.3
Family Handyman (10X) A.	66.2	66.8	667.7	640.0
Flower & Garden (6X)	—	—	196.8	223.6
Home	42.5	27.9	423.0	298.3
The Homeowner (6X)	26.5	24.0	166.9	147.9
Horticulture	—	—	—	—
House Beautiful	127.1	105.4	990.2	870.8
House & Garden	98.5	93.8	732.2	922.8
Houston Home/Garden	140.8	—	1,151.7	1,254.0
Metropolitan Home	92.8	110.7	654.3	739.8
New Shelter (9X)	51.4	50.0	443.0	390.5
1001 Home Ideas	46.4	30.3	374.8	290.8
Organic Gardening	59.2	61.2	775.7	744.7
Phoenix Home/Garden	67.5	47.5	525.4	532.1
San Diego Home/Garden	67.3	70.0	743.7	614.5
Southern Accents (4X)	80.3	81.6	311.7	323.5
Southern Living	191.3	170.8	1,424.8	1,379.4
Sunset Magazine A.	201.8	172.7	1,573.5	1,508.9
Texas Homes	88.3	85.5	800.9	841.7
Workbench (6X)	73.6	73.9	356.4	385.7
Total Group	**2,258.9**	**1,940.3**	**17,919.3**	**17,360.6**
% change	+16.4%		+3.2%	
— In-flight & other passenger —				
Aboard Group (7) (4X)	—	—	102.5	157.3
Alaskafest	49.2	40.8	517.8	468.4
American Way	121.9	100.6	1,029.5	880.4
East/West Network:				
Amtrak Express	48.5	45.7	469.0	429.0
Continental	74.7	61.5	725.8	598.1
Eastern Review	129.0	96.3	1,142.2	886.2
Ozark	54.0	49.5	531.5	464.8
PSA Magazine	90.5	94.8	968.9	927.6
Pan Am Clipper	49.3	45.5	472.4	434.7
Republic Scene	81.0	61.0	647.9	263.1
United	125.8	90.8	1,075.2	842.5
USAir	73.0	62.8	704.4	530.1
Western's World	80.3	63.3	696.4	245.6
Halsey Publications:				
Air Cal	49.8	—	445.5	—
Delta Sky	77.2	50.5	736.3	582.9
Skylite	28.6	18.6	202.8	88.6
Hawaii	22.1	13.8	189.1	216.7
Pace (6X)	51.3	30.7	257.5	198.9
Spirit of Aloha	22.6	13.9	136.9	213.6
Southwest Airlines	96.6	105.7	1,090.1	1,062.8
Webb Publications:				
Frontier	34.8	37.7	390.6	425.7
Northwest Orient	53.3	28.3	430.0	321.9
TWA Ambassador	85.0	55.2	805.9	530.2
Total Group	**1,498.5**	**1,168.0**	**13,639.2**	**10,769.1**
% change	+28.2%		+26.6%	
— Men's —				
Esquire A.	108.3	80.5	1,021.1	705.5
Firehouse Magazine	66.4	50.3	539.3	504.7
Gentlemen's Quarterly A.	165.0	130.9	1,302.7	1,204.5
Penthouse A.	60.3	74.1	619.5	645.5
Playboy A.	96.2	107.8	900.0	1,088.4
Total Group	**496.2**	**443.6**	**4,382.6**	**4,148.6**
% change	+11.8%		+5.6%	
— Metropolitan —				
Aloha (6X)	28.3	42.8	168.5	181.5
Atlanta	71.3	68.8	622.1	725.2
Baltimore	68.2	82.7	654.7	648.0
Boston	159.0	184.3	1,452.6	1,436.7
California	74.8	90.3	726.5	772.8
California Living	76.7	93.6	572.0	641.7
Charlotte (10X)	26.0	23.0	294.5	199.6
Chicago	174.3	196.3	1,550.6	1,558.3
Chicago's North Shore	90.7	103.8	915.2	783.1
Cincinnati	87.9	96.5	641.6	609.2
Cleveland	80.0	78.8	812.8	710.7
Coast (38X)	75.0	64.0	2,911.2	2,748.0
Columbus Monthly	83.6	72.5	795.0	817.7
Commonwealth	29.3	41.5	327.0	666.5
Connecticut	79.0	76.0	735.4	739.9
Country Magazine	41.1	36.5	342.5	284.6
County Life	52.0	71.0	461.9	274.0
D/Magazine, Dallas/Ft. Worth	158.1	137.7	1,292.8	1,244.8
Denver	60.9	43.0	399.5	394.0
Exclusively Yours, Wisconsin (15X)	74.9	78.3	811.9	843.1
Grand Rapids	40.0	41.5	571.2	468.0
Gulfshore Life (10X)	51.8	43.0	496.1	565.0
Honolulu	106.1	113.8	721.8	739.3
Houston City	99.8	83.5	784.9	741.5
Indianapolis	48.7	43.7	517.0	569.4
Kansas City	39.0	29.3	336.6	274.7
Long Island Life	35.0	60.0	320.0	272.0
Los Angeles	251.0	242.0	2,158.5	2,156.0
Louisiana Life (6X)	102.8	87.4	460.6	392.4
Madison	51.0	52.8	456.0	417.8
Miami/South Florida E.	115.6	112.8	943.6	950.2
Milwaukee	45.7	35.9	237.4	323.0
Minneapolis/St. Paul	138.4	118.3	913.8	834.7
Monthly Detroit	54.3	78.9	592.5	607.8
Nashville	46.0	67.0	503.0	535.0
New Jersey Monthly	66.0	66.7	581.4	616.8
New Mexico	42.4	34.6	293.9	345.7
Ohio	45.1	39.8	557.7	472.1
Oregon	37.3	18.2	263.0	224.3
Orlando	76.0	62.8	826.9	754.0
Pacific Northwest (10X)	26.2	21.1	243.5	271.4
Palm Beach Life	79.0	92.3	403.8	427.6
Palm Springs Life	135.6	140.9	1,305.9	1,315.0
Philadelphia	167.2	155.5	1,435.5	1,408.6
Phoenix	91.5	96.6	855.6	875.4
Pittsburgh	87.7	71.7	669.1	551.0
St. Louis	70.0	74.0	637.0	707.2
San Diego	162.6	133.9	1,496.2	1,420.8
San Francisco	64.7	55.5	657.4	551.9
San Francisco Focus	72.3	62.3	532.8	427.0
Shenandoah/Va. Town&Country (6X)	62.0	59.6	295.2	222.6
Tampa Bay	39.2	—	282.1	—
Texas Monthly	170.5	184.7	1,352.3	1,441.3
Twin Cities	98.0	69.4	603.9	526.3
Washington Dossier	71.0	64.5	556.3	422.7
The Washingtonian	175.0	171.2	1,582.6	1,494.0
Total Group	**4,645.8**	**4,566.6**	**41,923.5**	**40,601.7**
% change	+1.7%		+3.2%	
— Movie/romance/radio/tv —				
Macfadden's Women's Group:				
Modern Romances	26.7	27.3	292.3	315.9
Secrets	26.7	27.3	292.3	315.9
True Confessions	26.7	28.3	293.3	329.6
True Experience	26.7	27.3	292.3	315.9
True Love	26.7	27.3	292.3	315.9
True Romance	26.7	27.3	292.3	315.9
Sterling Women's Group:				
Daytime TV	28.8	31.3	325.8	334.7
Modern Screen	—	—	210.2	230.4
Movie Mirror (6X)	28.2	33.3	178.3	198.1
Soap Opera Stars	20.5	24.3	240.3	248.7
TV Movie Screen (6X)	—	33.3	126.6	166.5
TV Picture Life (6X)	26.2	33.3	113.9	196.7
Teen Beg (6X)	—	7.6	37.8	37.7
Total Group	**263.9**	**327.9**	**2,987.7**	**3,321.9**
% change	-19.5%		-10.0%	
— Music/entertainment —				
American Film (10X)	36.7	60.8	299.5	283.3
Audio	63.9	47.0	596.0	391.5
Circus Magazine	39.5	29.3	319.5	327.9
Dance Magazine	62.0	61.4	678.3	666.3
Musician	64.0	57.6	706.9	610.8
Playbill	71.7	71.0	596.1	600.1
Record	22.5	8.5	118.6	76.3
Stereo Review	60.2	64.9	548.2	577.6
Total Group	**420.5**	**400.5**	**3,863.1**	**3,533.8**
% change	+4.9%		+9.3%	
— Newspaper, Sun. magazines —				
Family Weekly A.	52.8	71.4	774.2	817.0
Parade	53.8	64.2	716.6	738.4
Total Group	**106.6**	**135.6**	**1,490.8**	**1,555.4**
% change	-21.3%		-4.1%	
— Outdoor & sport —				
Alaska	42.3	40.7	452.6	497.7
The American Handgunner (6X)	38.2	43.1	236.4	226.6
American Hunter	28.6	21.7	238.7	198.1
American Rifleman	30.3	32.2	325.1	356.5
Backpacker (6X)	55.4	51.7	310.7	276.9
Bass Master (8X) A.	50.2	38.8	416.8	439.8
Bicycling (9X)	79.1	79.4	896.5	760.8
Field & Stream	73.0 •	81.7	957.3	865.3
Fins & Feathers A.	37.1	33.8	441.7	398.3
Fishing World (6X)	20.9	17.6	225.8	194.9
Florida Sportsman	58.1	45.2	747.2	701.5
Flying	57.8	39.8	463.6	504.0
Fur-Fish-Game	30.6	35.3	265.5	298.4
Golf Magazine	47.6	43.0	700.5	738.5
Guns	35.9	34.2	323.8	358.0
Guns & Ammo	56.6	68.2	554.8	573.2
Outdoor Life	53.5	72.8	794.5	766.8
Petersen's Hunting	51.0	53.1	452.3	450.3
The Runner	47.8	44.2	461.2	396.4
Runner's World (13X)	47.7	44.3	540.9	482.0
Salt Water Sportsman	46.7	41.7	504.6	612.3

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. D. November issue suspended. E. Previously was Miami Magazine. F. Combined issue in 1982. *All affiliated with Sunday Mag/Net. except Los Angeles Times Home Magazine and New York Times Magazine.

(Continued on Page 56)

ad linage

(Continued from Page 55)

	Current month 1983	1982	Year-to-date 1983	1982
Shooting Times	41.3	40.5	411.7	376.1
Ski (8X) A.	195.0	190.0	604.1	607.0
Skiing (7X) A.	186.3	177.0	716.6	648.0
Skin Diver	67.0	68.0	791.0	716.5
Southern Outdoors (8X)	42.7	41.2	379.8	379.3
Sport	50.3	53.3	452.7	444.5
Sports Afield	79.8	98.1	922.7	980.6
Tennis	51.6	39.2	858.8	707.7
Western Outdoors (10X)	22.6	23.2	307.5	322.2
World Tennis	40.2	34.5	554.0	476.9
Total Group	**1,764.8**	**1,727.5**	**16,399.4**	**15,755.1**
% change	+2.1%		+4.0%	

— Photography —

American Photographer	58.0	60.0	565.4	537.0
Petersen's Photographic	57.5	51.6	407.3	484.9
Popular Photography	110.5	144.2	1,223.2	1,422.2
Total Group	**226.0**	**255.8**	**2,195.9**	**2,444.1**
% change	−11.6%		−10.1%	

— Religious —

BBI Jewish Monthly (10X)	24.6	22.8	220.8	228.1
Christian Herald	51.0	41.2	404.7	400.4
Christian Life	38.9	48.8	312.4	326.2
Christianity Today	81.8	119.0	701.8	753.4
Inside (4X)	74.5	77.3	293.1	282.4
Moody Monthly	60.3	65.3	523.3	524.4
Total Group	**331.1**	**374.4**	**2,456.1**	**2,514.9**
% change	−11.5%		−2.3%	

— Science/electronic/mechanic —

Compute	190.2	128.7	1,575.7	1,059.7
Computers & Electronics	53.0	70.3	653.9	638.0
Creative Computing	197.3	188.0	1,946.4	1,436.8
Discover	53.3	51.6	462.6	381.2
Electronic Games	48.7	43.7	498.0	189.6
Mechanix Illustrated	73.6	74.1	776.3	730.6
Omni	84.0	78.1	731.6	643.6
Personal Computing	223.1	197.7	2,206.5	1,662.5
Popular Mechanics	109.4	104.4	1,096.8	1,122.1
Popular Science	104.4	95.6	965.3	911.0
Science Digest	52.0	34.7	374.5	300.2
Science 83 (10X)	60.3	45.0	365.9	328.7
Scientific American	115.8	113.3	673.5	830.3
Spectrum	121.5	67.3	958.3	775.6
Total Group	**1,486.6**	**1,292.5**	**13,265.3**	**11,000.8**
% change	+15.0%		+20.7%	

— Women/fashion/service —

Bride's Magazine (6X) A.	253.5	222.5	1,819.2	1,675.2
Cosmopolitan A.	235.8	206.0	2,242.7	2,094.1
Essence	78.2	86.0	861.6	860.4
Family Circle A.	178.8	160.0	1,667.0	1,572.8
Glamour	210.8	167.4	1,862.6	1,757.2
Good Housekeeping A.	225.2	234.2	1,888.8	1,848.9
Handmade (6X)	28.8	37.3	117.9	118.4
Harper's Bazaar	176.8	144.2	1,439.4	1,270.2
Health	46.3	48.0	362.7	322.3
Ladies' Home Journal	—	—	—	—
Ladycom (10X)	34.7	38.8	356.4	326.3
Lady's Circle	9.3	8.8	93.2	107.3
Mademoiselle	164.3	136.6	1,475.2	1,417.7
McCall's	135.1	130.9	1,025.9	957.3
Modern Bride (6X)	201.5	146.5	1,518.5	1,440.0
Ms.	58.3	55.9	493.0	527.8
New Woman	59.8	44.5	524.7	446.0
Parents Magazine A.	106.6	99.1	847.1	804.1
Playgirl	35.5	38.6	420.4	436.8
Redbook	124.6	98.4	997.2	965.3
Self	92.2	74.9	856.0	774.8
Seventeen	107.0	96.4	1,226.4	1,229.2
Soap Opera Digest	28.5	27.0	345.1	300.8
'Teen Magazine	50.0	51.2	503.4	521.2
True Story A.	57.3	59.8	634.8	655.2
Vogue	346.5	296.3	2,864.5	2,585.2
W Magazine	131.1	110.1	1,111.6	1,015.4
Weight Watchers	28.3	26.1	308.9	318.3
Woman's Day A.	150.9	149.1	1,465.0	1,367.0
The Workbasket (10X)	50.8	50.2	397.3	385.1
Working Mother	111.4	99.5	772.1	773.8
Working Woman	142.5	138.8	1,090.7	922.9
Total Group	**3,380.4**	**3,283.1**	**31,729.3**	**29,797.0**
% change	+11.4%		+6.4%	

— Youth —

Boys' Life	37.4	33.5	257.4	233.3
Campus Life	42.6	48.4	408.0	436.5
Total Group	**80.0**	**81.9**	**665.4**	**669.8**
% change	−2.3%		−0.8%	

October

	Current month 1983	1982	Year-to-date 1983	1982

— Business —

Atlanta Bus. Chronicle (52X)	57.2	40.0	341.8	260.4
Barron's (52X)	273.3	191.4	2,046.3	1,691.8
Black Enterprise	82.9	49.1	605.0	502.1
Boston Business Journal	58.2	35.8	634.2	354.0
Business Week (52X) A.	584.1	429.2	3,712.2	3,588.9
California Business	70.0	58.0	732.0	722.0
Capital District Bus. Review	36.5	25.0	365.0	309.0
Corporate Report/Kansas City	59.7	55.8	511.4	529.2
Corporate Report/Minnesota	61.9	83.9	770.3	801.1
Crain's Chicago Bus. (52X)	190.9	134.1	1,249.1	1,053.4
Crain's Cleveland Bus.	64.9	47.2	509.1	350.5
Dallas/Ft. Worth Bus. (52X)	62.1	50.6	388.1	408.2
Dun's Business Month	94.1	93.4	643.1	679.5
The Executive	112.8	129.9	871.3	918.6
Financial World (24X)	42.6	57.7	355.3	474.4
Florida Trend	100.8	80.2	745.6	682.3
Forbes (26X)	446.7	316.7	2,606.5	2,335.7
Fortune (26X) A.	519.3	317.1	2,601.7	2,114.4
Frequent Flyer	67.4	60.6	531.8	378.3
Hawaii Business	48.3	46.2	480.2	413.8
High Technology F.	37.5	55.3	280.5	214.4
Houston Bus. Journal (52X)	185.5	184.8	1,514.8	1,799.7
Inc. Magazine A.	141.8	121.5	1,030.3	841.8
Income Opportunities (10X)	55.0	48.2	399.0	383.9
Industry Week (26X) A.	151.1	86.4	1,030.9	1,103.2
Indianapolis Business Journal	103.0	85.6	862.6	687.9
Nation's Business A.	25.9	44.5	250.2	352.2
New England Bus. (20X) B.	75.8	72.0	671.5	606.4
New Orleans Citibusiness (26X)	145.2	88.0	1,088.4	737.0
Pacific Business News (52X)	127.9	109.5	995.4	903.1
Philadelphia Bus. Journal	93.2	48.9	678.3	293.8
Pittsburgh Bus. Times (52X)	60.8	54.0	527.8	433.0
St. Louis Business Journal	144.3	109.5	1,085.1	946.5
Texas Business	117.5	59.3	642.4	536.7
Venture	87.0	41.5	590.3	369.3
Total Group	**4,595.2**	**3,510.9**	**32,347.5**	**28,776.5**
% change	+30.5%		+12.4%	

— Newspaper Sunday magazines* —

Arizona Republic	71.2	105.9	638.3	931.6
Boston Globe	272.4	226.3	1,813.6	1,700.7
Chicago Tribune	106.2	113.4	827.8	944.2
Cincinnati Enquirer	84.9	102.6	736.0	801.1
Cleveland Plain Dealer	105.5	103.6	836.9	780.6
Columbus Dispatch	50.8	57.6	457.9	530.5
Dallas Times Herald	55.7	78.1	765.9	729.2
Denver Post	125.8	131.9	1,099.6	1,206.3
Detroit News	104.8	92.2	879.8	877.2
L.A. Times Home Magazine	166.8	124.4	932.9	983.7
Louisville Courier-Journal	99.8	128.6	853.5	960.0
Miami Herald	50.6	60.4	526.6	603.4
New York News	63.2	86.4	589.1	562.5
New York Times Magazine	515.7	448.6	3,432.0	3,375.9
Philadelphia Inquirer	62.9	73.2	560.1	634.9
Toledo Blade Magazine	41.6	50.5	448.2	456.3
Washington Post	154.2	150.7	1,104.0	1,177.5
Total Group	**2,132.1**	**2,134.4**	**16,502.2**	**17,255.6**
% change	−0.1%		−4.3%	

— Weeklies/bi-weeklies —

The Advocate (25X)	106.9	100.4	1,066.9	821.5
Army Times Military Group:				
Air Force Times (52X)	174.1	138.9	1,455.4	1,419.5
Army Times (52X)	181.9	138.7	1,429.0	1,394.7
Navy Times (52X)	186.6	159.7	1,611.5	1,655.5
The Times Magazine	7.5	12.8	143.9	149.3
The Blood-Horse (52X)	603.5	551.5	4,659.5	4,548.8
Capper's Weekly (26X)	28.3	27.4	266.4	246.1
Commonweal (22X)	3.4	7.1	60.7	69.6
Golf World (43X)	48.7	41.2	778.7	703.7
Grit (52X) A.	32.4	29.8	257.7	264.8
National Review	26.0	46.8	309.8	285.3
New Republic (48X)	45.9	42.0	325.6	299.5
New York Magazine (50X)	321.0	291.5	2,263.6	1,980.3
New Yorker (52X)	477.6	405.0	2,795.7	3,035.1
Newsweek (52X) A.	387.1	312.4	2,281.5	2,177.4
People (52X)	374.9	322.6	2,635.9	2,741.3
Rolling Stone (25X)	119.3	92.6	928.6	880.1
Sporting News (52X)	81.8	59.0	566.6	531.2
Sports Illustrated (52X) A.	333.6	266.4	2,280.8	2,161.5
Time (52X) A.	386.6	254.9	2,191.7	2,062.5
Travelhost (52X) C.	3,112.0	2,977.0	29,254.0	25,436.0
TV Guide (52X) A.	416.0	474.9	2,957.9	3,045.0
Us Magazine (26X)	43.0	39.7	449.8	481.7
U.S. News & World Report (52X) A.	210.3	189.8	1,430.9	1,378.7
Total Group	**6,960.8**	**6,982.1**	**62,402.1**	**57,789.1**
% change	−0.3%		+8.0%	

— Foreign —

Buenhogar:				
Central America	3.0	6.5	18.0	38.5
Chile	3.0	1.2	13.0	15.3
Colombia	42.2	88.8	373.8	569.7
Dominican Republic	7.0	12.2	116.5	135.5
Ecuador	20.5	23.3	104.5	126.0
Mexico	61.2	78.0	403.0	589.5
Peru	39.8	58.0	224.3	339.8
Puerto Rico	12.2	15.5	119.2	180.5
U.S.	29.7	6.5	113.5	69.5
Venezuela	33.5	68.7	207.7	385.3
Coqueta:				
Central America	—	—	—	5.0
Colombia	1.5	2.0	25.5	40.5
Mexico	6.0	8.5	23.0	62.8
Peru	—	—	—	5.0
Puerto Rico	1.0	1.0	3.0	16.0
Venezuela	1.0	7.0	26.0	55.5
Geomundo:				
Central America	8.0	12.0	48.0	65.0
Chile	7.0	14.0	48.0	73.0
Colombia	12.5	20.5	105.5	147.8
Ecuador	6.0	9.0	40.0	49.0
Mexico	9.0	18.0	63.5	131.7
Peru	11.0	12.0	63.0	90.5
Puerto Rico	6.0	11.0	36.0	72.0
Venezuela	10.0	21.2	101.7	165.0
Hombre De Mundo:				
Central America	7.0	6.5	54.3	53.8
Chile	7.0	8.5	56.0	53.0
Colombia	16.0	19.7	106.0	137.2
Ecuador	7.0	6.5	55.0	45.8
Mexico	24.5	28.5	127.8	199.3
Peru	10.0	10.0	56.0	64.8
Puerto Rico	10.0	9.5	59.3	82.8
Venezuela	12.0	36.0	137.3	288.5
Ideas Para Su Hogar:				
Central America	—	—	2.0	6.0
Chile	—	1.0	—	8.0
Colombia	36.8	63.5	254.5	340.7
Ecuador	7.0	6.0	34.0	73.7
Mexico	18.5	31.7	135.3	228.8
Peru	27.2	14.8	92.2	127.5
Puerto Rico	—	1.0	6.0	17.5
Venezuela	18.0	34.3	125.2	251.0
Intimidades:				
Central America	—	1.0	—	16.0
Chile	—	1.0	5.5	5.5
Colombia	1.0	1.0	8.0	16.0
Mexico	3.0	3.5	19.5	46.5
Puerto Rico	—	2.0	6.2	27.0
Venezuela	2.0	8.0	39.0	56.5
Mecanica Popular:				
Argentina	9.3	11.3	73.2	89.3
Central America	13.5	20.5	124.7	174.7
Chile	8.3	10.7	63.7	67.0
Colombia	18.3	30.3	170.7	227.8
Mexico	11.3	23.8	93.7	226.8
Peru	26.5	33.0	200.5	251.3
Puerto Rico	14.5	17.5	146.2	159.2
Venezuela	21.7	33.5	202.0	260.3
The Ring en Espanol:				
Mexico	—	1.0	—	15.0
Puerto Rico	—	5.0	—	37.5
U.S.	3.3	5.0	33.0	45.5
Venezuela	—	3.0	7.0	31.0
Vanidades Continental:				
Central America	9.0	16.0	70.2	154.3
Chile	1.0	11.3	31.5	133.8
Colombia	80.5	124.3	638.5	896.2
Dominican Republic	17.5	18.5	176.0	278.2
Ecuador	16.8	26.5	126.2	220.0
Mexico	154.2	143.3	955.5	1,160.2
Peru	37.3	62.3	286.5	446.8
Puerto Rico	29.2	33.5	331.5	426.8
U.S.	57.0	50.5	455.3	527.2
Venezuela	42.5	121.0	428.3	799.8
Business Week Int'l.	250.7	247.4	1,469.3	1,820.7
Cosmopolitan Foreign Editions:				
Australia	112.9	105.4	637.6	619.9
Brazil	53.0	76.0	440.2	504.6
France	152.5	151.7	941.2	1,009.6
Germany	91.3	44.6	565.1	246.1
Great Britain	162.0	157.0	1,094.9	1,103.0
Greece	53.0	63.0	475.0	516.0
Holland	70.0	40.0	416.5	210.0
Italy	105.0	123.7	664.0	717.7
Japan	42.7	40.0	390.4	356.6
Cosmopolitan en Espanol:				
Central America	3.3	4.3	20.8	35.2
Colombia	11.5	28.7	139.5	203.3
Ecuador	0.3	1.8	8.0	28.8
Mexico	79.5	83.5	545.7	659.5
Peru	4.3	13.5	65.0	132.3
Puerto Rico	21.8	27.7	189.8	251.8
U.S. (Spanish language)	32.0	18.5	178.8	192.7
Venezuela	16.8	40.5	126.7	297.8
International Communications:				
African Business	29.7	24.8	293.3	313.5
New African	9.3	32.7	190.8	218.1
The Middle East	18.5	30.1	260.5	204.7
International Herald Tribune	101.6	115.5	863.1	917.2
International Management:				
Africa	18.7	18.7	160.2	138.8
Europe	60.0	56.0	404.2	401.8
Latin America	17.7	16.2	125.0	133.5
Middle East	31.5	23.0	228.8	207.2
Pacific	18.7	21.7	153.0	170.5
Johnston International:				
Alam Attijarat	86.2	90.6	607.5	708.1
Ejecutivo	17.0	14.2	74.0	116.5
Modern Africa	25.5	43.3	118.4	176.1
Modern Asia	39.8	42.5	352.0	356.6
Newsweek International A:				
Atlantic	150.4	129.5	914.8	898.0
Latin America	43.4	45.5	300.6	293.9
Pacific	114.4	112.7	711.1	730.0
Progreso (9X)	16.5	20.8	90.5	124.7
Reader's Digest:				
Arabic	19.0	16.0	127.5	135.0
Asian	303.8	234.0	2,185.8	1,765.0
Australian	100.5	79.5	676.7	753.8
Belgian-Flemish	122.0	110.0	783.0	748.5
Belgian-French	90.0	90.0	586.0	593.0
British	58.9	101.8	586.4	586.5
Chinese B.	126.0	117.0	1,054.3	928.0
Danish	46.8	18.5	329.7	314.3
Dutch	55.5	90.8	336.1	428.7
Finnish	121.0	57.8	665.0	508.6
French	82.0	89.3	544.6	664.1
German	100.6	93.8	701.5	706.3
Greek	11.5	11.5	11.5	99.5
Iberian	30.0	58.0	173.5	271.5
Indian-English	93.5	71.5	713.8	808.0
Indian-Hindi	9.0	13.5	44.5	157.0
Italian	52.5	76.0	455.0	551.5
Japanese	60.3	45.9	489.0	472.2
Korean	25.5	24.3	205.2	201.7
Latin American:				
Argentina	26.0	26.5	150.0	173.5
Brazil	6.0	12.0	85.5	120.8
Central American	19.5	20.0	114.5	143.0
Chile	28.0	27.0	156.5	204.0
Colombia	16.0	81.0	347.0	454.0
Ecuador	15.0	20.0	109.0	130.0
Mexico	77.3	72.9	446.0	608.0
Peru	14.0	20.0	101.5	132.5
Puerto Rico	7.0	19.0	63.5	126.5
U.P.B.	13.0	25.5	103.5	161.5
U.S. Spanish	15.5	11.0	139.5	159.0
Venezuela	19.5	35.5	141.5	223.5
New Zealand	100.5	100.5	656.8	696.5
Norwegian	71.7	66.5	381.8	445.9
Portugal	31.0	36.5	433.6	412.1
South African	131.0	161.5	975.0	1,129.0
Swedish	28.0	34.5	196.0	261.5
Swiss-French	42.0	41.0	288.0	315.5
Swiss-German	56.0	47.0	365.0	396.8
Time International:				
Time-Asia	166.8	154.3	997.3	976.0
Time-Atlantic	246.4	124.6	1,078.5	1,032.8
Time-Canada	319.0	212.2	1,506.7	1,468.4
Time-Latin America	92.0	79.4	480.6	665.1
Time-South Pacific	256.9	228.3	1,312.1	1,507.8
Viseo (52X)	192.0	172.3	1,718.5	1,657.3
Vision/Latin America (26X) A.	42.8	56.3	295.8	360.7
Total Group	**6,712.6**	**6,978.3**	**45,900.1**	**51,888.7**
% change	−3.7%		−12.9%	

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C2710-1 11/29/83

Direct marketing now getting respect - Magazine

Catalogs have wish for Christmas - Page 98

Houston tries image ads - Page 3

Advertising Age

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'Day' aftermath

Sponsors pull coup

By DIANE MERMIGAS

Advertisers who bought time in ABC-TV's controversial "The Day After"—some of it at cut rates—have not only emerged unscathed by what turned out to be an empty threat from the Moral Majority, but came away with record tv-movie exposure and some positive consumer reaction to boot.

Ratings: Page 2

Several of the advertisers on the show said that they had altered media plans or launched holiday campaigns early to take advantage of the exposure opportunity. And they weren't especially worried about consumer reaction or interest-group retaliation.

Results from two viewer polls would seem to indicate they gambled wisely. Surveys by Warner Amex's two-way Qube cable tv system and J. Walter Thompson USA both turned up similar findings: One-quarter of viewers in both polls said they felt more favorable toward advertisers who had participated in "The Day After." Slightly more than two-thirds said their opinions of the advertisers involved had not changed.

Jerry Falwell, leader of the conservative organization, last week backed off his earlier threat (AA, Nov. 21) to boycott the 16 companies who purchased the 25 30-second national spots on the Nov. 20 drama,

(Continued on Page 104)

ABC the big victor

By CRAIG REISS

New York—The prime time broadcast of "The Day After" broke all the rules of network tv economics.

In the middle of a critical ratings sweeps period, ABC voluntarily—and strategically—eliminated advertising availabilities for itself and its affiliates for most of the evening.

Analysis

It ran a program whose content environment shrank the available pool of advertisers, even though most advertisers that did not advertise in the show conceded "Day After" could be the best prime time ad buy ever on a cost-efficiency basis.

ABC drove down the price of ad time during a fourth quarter that already has many advertisers seeking relief from their upfront commitments, and scatter advertisers playing an effective cat-and-mouse game that has been driving prices even lower through January.

ABC sold final spots in "Day After" as low as $60,000 per 30 seconds, far below the going rate for a regular weekend movie and an incredible 60¢ cost-per-thousand rate in total audience.

But for every penny ABC lost in ad revenues, it was able to inflict a

(Continued on Page 104)

GM breaks 'sale' drive

By RALPH GRAY

Detroit—General Motors drop-kicked the first model-1984 special sale deal through the automotive goalposts over the Thanksgiving holidays, catching the competition on the sidelines.

Ads broke over the long holiday weekend for a "buy now, pay later" financing plan on selected GM models.

Ford Motor Co., Chrysler Corp. and American Motors had no immediate rejoinder.

Chevrolet carried the ball with 45% of its tv buys, mainly in sports programing, on the "Big USA-1 yearend sales drive."

The Campbell-Ewald advertising for Chevrolet used gridiron settings as the background for such lines as "Take retail delivery now on selected models and make no monthly payments until March 1." Other offers include special option packages.

Chevrolet is trying to deliver 250,000 vehicles in the 40-day period. The financing plans via General Motors Acceptance

(Continued on Page 104)

Vicks eyes bigger share in shampoos

By PAT SLOAN

Apparently striving to become the largest volume shampoo marketer, Richardson-Vicks has started testing another new entry, Crystal Spring.

Cable tv spots for the shampoos and companion conditioner began appearing in Eau Claire, Wis., this month, created by Jordan, Case & McGrath.

The launch comes amidst stepped-up new-product development activity in several divisions of the Wilton, Conn.-based company, and helps fulfill a long and often-stated goal of Richardson-Vicks to come out with more internally developed products.

Crystal Spring, billed as having a "special natural protein, the same kind hair is made of," is one of only a few shampoos, such as International Playtex's Jhirmack, to be packaged in a carton.

Some observers believe Richardson-Vicks has identified a "hole" in the $1.3 billion shampoo market where there are few nationally advertised brands positioned as "natural" being sold in traditional drug and food stores.

One such product, introduced earlier this year, is Nature's

(Continued on Page 102)

Military personnel, like these marching in for Whoppers at Burger King's unit on the Governors Island, N.Y., Coast Guard base, are orderly customers and the target of the industry's latest share battle.

Fast-foods stalk locations

By SCOTT HUME

When the Navy's submarine-tender U.S.S. L.Y. Spear heads out to sea, it carries a Baskin-Robbins ice cream shop on board.

That's hardly the usual site for a fast-food restau-, but the industry's growth is making traditional tions harder to find and more expensive to ac-re.

The maturing fast-food business' market-share uggle that has forced chains to adopt harder adver-g and marketing tactics is spilling over into the fight for sites.

As a result, the major fast-food chains are looking at unusual unit designs and some new markets in an effort to maximize brand visibility and sales growth.

Placing fast-food units on military bases is only one of the options chains are pursuing. The first of 70 planned Burger Kings inside Woolworth stores opened in New York in time for Thanksgiving. A McDonald's soon will appear in Montreal's Central Station train depot.

Hospitals, colleges, museums and bus stations are

(Continued on Page 55)

last minute news

Lederle debuts Caltrate calcium supplement

Wayne, N.J.—American Cyanamid's Lederle Labs is introducing nationally Caltrate 600, a high-potency calcium supplement. A multi-million-dollar, multimedia campaign breaks in February. Plans call for network tv, ads in women's magazines, 50¢ coupons and a free mail-in starter kit offer. Carrafiello-Diehl Associates, Irvington, N.Y., is the agency.

Hanover brings astronaut foods down to Earth

Hanover, Pa.—Hanover House Industries, a subsidiary of Horn & Hardart, is planning the commercial introduction of the foods used by the astronauts. The announcement is expected at a Dec. 6 press conference in New York. Called

AA
DC20014CONGLI FMJF M
CONGRESSIONAL INFO SERVICE
SRI ACQUISITIONS
4520 EAST-WEST HWY #800
WASHINGTON DC 20014

C

heats up — Page 2

Tracking 'burger battle' ad awareness - Page 3

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Huhtamaki goes sweet on U.S. candy market

By JANET NEIMAN

CHICAGO—Huhtamaki Group, Finland's diversified consumer and industrial products marketer, has developed a sweet tooth for the U.S. confectionery industry.

In rapid succession, the Helsinki-based company purchased Leaf Confectionery, Beatrice Foods' confectionery operation and General Mills' Donruss bubble gum division, thrusting the company into the top 10 of U.S. confectionery companies.

Huhtamaki's new company, Leaf Inc., will combine all three operations along with its existing U.S. subsidiary, Finnfoods, based in Englewood Cliffs, N.J.

The acquisitions are expected to encourage advertising and marketing efforts for the newly acquired brands. Finnfoods said last week no decisions have been made regarding agency assignments for the brands, but several sources said no changes will be made.

Leslie Shankman, former president of Leaf Confectionery and now president of Leaf Inc., said last week he expects his division's ad spending to at least double —to about $2.5 million—in '84 as a result of the acquisition.

Huhtamaki is "very advertising and promotional-type-advertising-minded," he said. Referring to "fairly heavy advertising" that Huhtamaki Group has done on its products in Europe, he said he expects all the products under the new Leaf banner to receive stronger advertising in the future.

The existing U.S. division of Huhtamaki—Finnfoods—is handled by Lempert Co., Belleville, N.J. Agency president Phil Lempert agreed with Mr. Shankman, saying, "I think you'll find the new management is much more consumer-aggressive than Beatrice has been with the confections unit or than Leaf Confectionery was. They're very aggressive. . .they've done a superb job in Europe."

The three new units are expected to add about $290 million in annual sales to Huhtamaki Group's 1982 worldwide net sales of $367 million. The Helsinki company also markets canned and frozen foods, beverages, pharmaceuticals, foodservice disposables and industrial products.

The new Leaf will be divided into six separate operating divisions. Leaf confectionery division, Chicago, will market the Leaf line of candy and gum spe-

(Continued on Page 102)

Hershey is going to adults with its new Take Five candy bar.

New Hershey bar takes aim at Mars

By GAY JERVEY

In a major confectionery introduction, Hershey Foods is launching Take Five, a light chocolate and peanut creme wafer designed for an older crowd.

The company, in a neck-and-neck race with candy competitor M&M/Mars, claims the eventual rollout will be "one of the biggest" in its history.

Hershey is moving Take Five into the Cleveland, Dallas, Denver and Houston markets. Advertising by Doyle Dane Bernbach is scheduled to break soon after the bar has settled onto retail shelves, probably within the next several weeks.

At the same time, the company is extending Reese's Pieces to an offshoot called Reese's Pieces Peanuts, a peanut center covered with

(Continued on Page 102)

Braniff to unfurl its new colors

By TOM BAYER

DALLAS—Braniff International will reveal its new colors Nov. 29 in a christening ceremony where it is expected to introduce a plane with a white top, a blue belly and a red logo on the side.

The airline would not release the specific design.

Braniff confirmed that it is working tentatively with a list of 20 cities to be served by Braniff's 30 Boeing 727-200s with 85 departures daily from Dallas-Fort Worth Airport.

The markets are: Austin, Chicago, Denver, Houston, Kansas City, Las Vegas, Los Angeles, Miami, Midland/Odessa, Newark, New Orleans, New York, Oklahoma City, Orlando, St. Louis, San Antonio, San Francisco, Tulsa, Tampa and Washington.

In preparation for the March 1 startup, Braniff expects to begin its advertising via N W Ayer in early February.#

O&M wins Polaroid videocassettes

DDB on a losing streak

By CHRISTY MARSHALL

NEW YORK—November may well be remembered as one of Doyle Dane Bernbach's cruelest months.

In the past weeks, the agency lost International Business Machines (corporate tv), spending between $13 million and $19 million annually; Bulova Watch, worth $4 million, and, most recently, media buying for CBS Entertainment, about $1 million.

On top of that, longtime client Polaroid Corp. last week named Ogilvy & Mather to handle advertising for its domestic videocassette entry. Its campaign is slated to begin in the first quarter of 1984 with a multi-million-dollar budget.

DDB remains Polaroid's primary agency in the U.S. and overseas.

But despite the losses, "This is not a troubled time," contended Robert Pfundstein, chief financial officer of DDB. The agency's earnings will be up for the year, he said.

He noted that the agency continues to handle IBM Information Systems products, and increased budgets of that IBM unit will more than offset the loss of the corporate account, which moved to Lord, Geller, Federico, Einstein (AA, Nov. 14).

A DDB press release last week said the agency and Bulova had "mutually" terminated their relationship because of Bulova's "heavy concentration of trade advertising."

DDB said in the release that the account would be better serviced by a smaller agency.

However, Marvin Schneider, chairman of Bulova's new agency, Sherwood & Schneider, a subsidiary of Della Femina, Travisano & Partners, said his shop primarily was working on a consumer campaign with a

(Continued on Page 106)

highlights

Monday, November 28, 1983

Agents for James Garner and Mariette Hartley say their clients will end their presenter roles for Polaroid at the end of the year. *See Page 6.*

Ford and Dodge are planning to concentrate their ads on specific tv programs and maximizing print ad buys. *See Page 10.*

Time Inc. has pulled the plug on its teletext experiment, at an estimated loss of $20 million to $30 million. *See Page 12.*

The FTC is being urged by opponents of liquor advertising to ban ads targeting youths and heavy drinkers. *See Page 14.*

A trend toward drama rather than comedies is seen in the lineup of movies slated for release during the Christmas season. *See Page 24.*

CEO, a new men's fragrance developed by two former cosmetics company executives, is entering the market. *See Page 26.*

Actress Lynn Redgrave is typecast in her role as tv ad presenter for Weight Watchers frozen foods. *See Page 28.*

TvQ ratings for the new fall season once again indicate some growth potential for series not faring all that well in the Nielsens. *See Page 31.*

Concert Cinema is bringing ad-supported clips of music concerts to movie theater screens. *See Page 32.*

Cigaret industry sales for 1983 are expected to be lower than anticipated, with consumption dropping by at least 4% at an annual rate. *See Page 37.*

Wall Street looks for improved women's fragrance sales, but Gillette's Body Flowers, a deo-cologne, may be the biggest winner of all. *See Page 73.*

Radio activity is perking in the sports and music fields for 1984. *See Page 89.*

Radio Caroline, the pirate radio station in the North Sea, begins taking advertising Dec. 19 after a three and a half-year hiatus. *See Page 96.*

CBS has closed a deal to retain broadcast rights to the NCAA basketball finals. *See Page 96.*

CORPORATE CLOSEUP

Dairy Queen still dominates the dairy dessert market with its soft-serve ice cream, but it also is slowly evolving into a restaurant chain. *See Page 4.*

INTERNATIONAL

Radical party president Raul Alfonsin and his new democratic government in Argentina are expected to make drastic cutbacks in commercial tv time after he is sworn in Dec. 10. *See Page 58.*

Procter & Gamble is re-entering the Chilean market after leaving earlier this year. This move into Chile may be a sign of an increasing interest in Latin America by P&G. *See Page 58.*

The South African government has launched an image-building ad campaign in the U.S. and U.K. *See Page 60.*

VIDEOTECH

ABC is opposing a new Arbitron rule requiring late-night newscasts to be included in weekly ratings averages. *See Page 66.*

United Satellite Communications began testing its direct broadcast satellite programing service in Indianapolis with virtually no advanced marketing. *See Page 72.*

MAGAZINE

An agency owner takes a bare look at lingerie advertising and makes some unusual comments. *See Page M-4.*

Direct Marketing: Where the field once belonged to book and record clubs, publishers and fund raisers, now there is hardly an industry that doesn't use direct marketing or mail in some form. *See Page M-9.*

Should agencies establish subsidiaries as a means to resolve client conflicts? Agency executives reveal their opinions on the issue. *See Page M-67.*

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Sweeps: 'Day' blasts ABC to top

By DIANE MERMIGAS

Intense prebroadcast publicity and heightened debate over nuclear arms contributed to ABC's "The Day After" becoming the highest-rated made-for-tv movie ever, industry observers contend.

The controversial nuclear-attack drama, which averaged a 46 rating and 62 share of the national tv audience, also was the top-ranked movie ever in household delivery to air on network tv.

The movie was seen in 38.5 million households. An estimated [illegible] million people saw some portion of the film.

In over-all ratings of all types of movies (theatrical and made-for-tv), "Day After" was second only to the original network tv broadcast of "Gone With the Wind." That theatrical averaged a 47.6/65 over two nights on NBC in November, 1976.

ABC also reported that "The Day After" ranked as the 12th-highest rated of all tv programs ever aired on network tv, placing behind such telecasts as "M*A*S*H" finale earlier this year, the 1980 "Who shot J.R." episode of "Dallas," the 1977 [illegible] of "Roots," "Gone With the Wind"

(Continued on Page 104)

Purina embraces low-price strategy

Alley Cat test entry follows Mainstay move

By JANET NEIMAN

Ralston Purina Co.'s new Alley Cat dry cat food, now testing in Phoenix and Tucson (AA, Oct. 17), will put the company's products into every price segment of the dry cat food category.

The product, which will represent Purina in the moderate-price segment of the branded, dry cat food market, is a response to what George Cook, director of marketing services for the St. Louis-based company, called the "rather dramatic" recent growth among generic and private label cat foods.

While Alley Cat is intended to combat that strength, it is being positioned as a "moderate price brand" (retailing at somewhere between premium-quality and private label dry cat food) rather than a "price brand competing directly against private label and generics," a Purina spokesman said.

"Purina already has a fairly major chunk of the cat food business now," said an executive at competitor Carnation Co., who sees Alley Cat as "another [Ralston] test of positioning to reach another segment of the market."

Selling Areas-Marketing Inc. figures, however, show sales of private label and generic cat foods peaked at 13.7% of the market in February, and have been declining since.

Drexel Burnham Lambert estimates Ralston's share of the $292 million dry cat food category as 62.1%, giving it the leading position in the market.

"Apparently they feel the need to have a price brand out there," one West Coast retailer said.

Purina already has eight other cat foods in national distribution: Cat Chow, Kitten Chow, Tender Vittles, Happy Cat, Special Dinners, Purina 100, Meow Mix and Thrive.

Ralston has acknowledged the similarity between the Alley Cat entry and the company's apparently successful repositioning of Mainstay dog food over the past two years.

Mainstay, introduced in 1979 with a pledge of $25 million in advertising and promotion support, was relaunched in early 1981 as an unadvertised, lower-end product.

The repositioning, a company spokeswoman explained last week, was intended to give retailers an alternative to private label and generics on which they can make a profit while offering consumers a product in whose name they have confidence.

Similarly, Ralston is saying that Alley Cat "provides another purchase opportunity for consumers," offering "Purina quality at a moderate price."

One retail source, who sees such a strategy at work in the Alley Cat entry, noted that Mainstay has moved up to "the middle of the category" in his marketing area, the West Coast. A Midwest buyer confirmed that Mainstay has "picked up" since the price drop.

SAMI reported a 22% increase in tonnage for Mainstay over the past year ended mid-September and a 9.4% increase in its dollar share, to about $19.7 million.

While Ralston has put no advertising behind Mainstay since its restaging, the brand has been heavily dealt in the trade, and has been promoted with couponed freestanding inserts and in-pack premiums, such as selected Rubbermaid dinnerware pieces and stationery.

Mr. Cook acknowledged that Mainstay has benefited from the repositioning.

Unlike Mainstay, however, Alley Cat has no name recognition and will be advertised via Gardner

(Continued on Page 101)

Houston hopes to hook 'em via its longhorn tag. . .

Houston drilling for a renewed economic spirit

By TOM BAYER

HOUSTON—A group of Houston citizens today will launch a campaign to encourage Houstonians to feel good about living in Houston, to focus on what's right about the city.

Following on the heels of a separate campaign begun to give Houston a slick, cosmopolitan image among the nation's convention planners and tourists, the "spirit" campaign begins a multimedia pep rally for a populace that needs cheering up in the face of economic adversity.

Houston is a boomtown gone bust, and the belief among many in the community is that although things will improve eventually, Houston never will be the same.

The trauma of the energy bust and peso devaluations has left its mark on all aspects of the economy, including advertising.

Clients have slashed or wiped out ad budgets, leaving agencies with little to do, little money to make. Larger agencies have tightened their belts and weathered the storm. Smaller agencies have been less fortunate.

A recent announcement from Cummings & Hester said the agency had ceased operations, a casualty of client cutbacks and heavy financial losses from a number of oil and gas industry-related clients.

. . .**Another** ad pitches its grand canyons.

But a new Houston may be emerging from the rubble of the depressed energy industry, for which it had become the capital and was riding tall in the saddle.

Just two years ago,

(Continued on Page 74)

O'Brasky takes over at 'Vanity'

By STUART EMMRICH

NEW YORK—Conde Nast ousted Joseph Corr Jr. as publisher of *Vanity Fair* last week and named *New York* associate publisher David O'Brasky—a veteran of the rough-and-tumble world of magazine ad sales—to take his place.

The move was cited by several people in the advertising community as a sign that Conde Nast has realized it can't sell *Vanity Fair* on its tony image alone.

"That magazine—like all magazines—needs a huckster behind it," said one media buyer at a New York ad agency. "And O'Brasky is a huckster."

Few people expressed surprise that Conde Nast finally had decided to replace Mr. Corr as publisher of the magazine. Several

(Continued on Page 106)

world news roundup

FRANKFURT—Henkel KGaA can continue to test its Pur concentrated detergent in Bavaria, according to a German regional court ruling last week. The court removed an injunction won by Colgate-Palmolive GmbH earlier this month on the grounds that Henkel was engaging in unfair competition against C-P's Fresh Start (AA, Nov. 21). C-P may appeal the ruling.

LONDON—McCann-Erickson won the $2.25 million International Gold Corp. account in the U.K., Italy, Germany and Spain last week. Ted Bates Worldwide and Foote, Cone & Belding also pitched for the account. Previously, it was handled by Chetwynd Haddons in the U.K. and Doyle Dane Bernbach in most of the other countries.

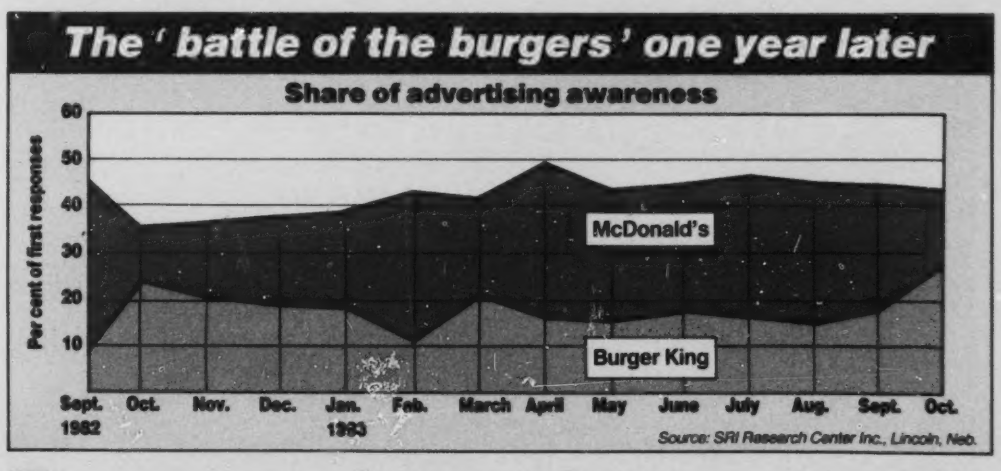
DUESSELDORF—Doyle Dane Bernbach here has picked up the estimated $2.4 million J.B. Berentzen distillery account. Intermarco-Farner lost the business after four years on the account.

LONDON—Marks & Spencer, the giant British retailer, may be considering a link with Italian retailer Euromercato. Sources speculate that this could involve a store-within-a-store or M&S goods sold alongside Euromercato's.

WIESBADEN—Lotus Beghin, the big French cellulose producer, is entering the German market with sanitary napkins and sanipads after a successful test. DFS&R Werbeagentur, Duesseldorf, handles the account.

TOKYO—The Ministry of Posts & Telecommunications has approved Japan's first major two-way urban cable system. The new system, in April, 1985, will be operated by International Cable Network,

(Continued on Page 60)



Burgers burn in memory

By SCOTT HUME

Fast-food's Battle of the Burgers is a year old and showing no sign of abating.

Since Burger King Corp. in September, 1982, fired the first salvo by proclaiming its Whopper sandwich the winner over McDonald's Big Mac and Wendy's Single in taste tests, the fast-food giants have engaged in a nonstop tug-of-war for consumers' attention.

adWatch

With fast-food chains' heavy reliance on impulse purchases, top-of-mind advertising awareness is particularly vital.

As measured by ADVERTISING AGE's exclusive adWatch survey, increases in awareness have alternated between Burger King and McDonald's with the swiftness of a good tennis volley. Awareness of Burger King's advertising rises one month, then falls as McDonald's picks up.

The ball is now back in McDonald's court.

Last month, 26.3% of respondents named Burger King when asked for the first fast-food advertising that came to mind.

That was an increase of 8.6 percentage points over September and Burger King's third-largest, one-month gain since the battle began.

McDonald's has maintained its first-place status since adWatch was inaugurated in April, 1982, although last month it slipped 2.4 points to a 42.6% share

(Continued on Page 80)